

CHECKLIST FOR GUARDIAN/CONSERVATOR

CASE NUMBER

At time of order of appointment, you (the guardian/conservator) need to file the following:

- ☐ Acceptance
- ☐ Guardian/Conservator General Information
- ☐ Address Information Form

If the guardianship/conservatorship has restricted funds you must file the following within 10 days of appointment:

- ☐ Proof of Restricted Account from Depository or Financial Institution

Within 30 days of your order of appointment you must file with the court the following:

- ☐ Inventory and Affidavit of Due Diligence
- ☐ Acknowledgement of Financial Institution form showing you provided your **order appointing** you guardian/conservator to all financial institution where the ward/incapacitated person/protected person has assets. You shall attach to this form a printout from each financial institution where the ward/incapacitated person/protected person has assets showing the assets held by the financial institution.
- ☐ Bond, if required

After you get your Letters, you must file with the court the following:

- ☐ Acknowledgement of Financial Institution Form showing you have provided your **Letters** to all financial institutions where the ward/incapacitated person/protected person has assets. You shall attach to this form a printout from each financial institution where the ward/incapacitated person/protected person has assets showing the assets held by the financial institution.
- ☐ Proof of completion of Guardian/Conservator training within 90 days.

If you become aware of additional assets, gifts, awards, settlements, or inheritances over \$500.00 not disclosed in the current inventory on file with the court, you must file a newly discovered assets form within 30 days.

Every year within 30 days of the anniversary of your appointment, you must file with the court the following:

- ☐ Condition of Ward Report with \$5.00 filing fee
- ☐ Updated Inventory/Annual Accounting with \$5.00 filing fee
- ☐ Bank Statements and/or brokerage reports with the annual accounting
- ☐ Certificate of Proof of Possession
- ☐ Proof of Restricted Account
- ☐ Affidavit of Mailing showing all of the annual reports were sent to all interested parties with Notice of Right to Object form.